

Job Description for the Post of Assistant Finance Business Partner

Reporting to: Finance Business Partner – OHCAT

Working with: Assistant Finance Director (AFD), Head of OHCAT and OHC, Academies Assistant Business Partners

Job Purpose:

To support the financial management for central teams and other financial needs as required.

Key Responsibilities:

Specific Responsibilities for Central Teams:

1. Preparation and maintenance of monthly accounting entries including accruals, prepayments and deferred income schedules.
2. Reconciliation of Intercompany balances and transfer of funds
3. Raise intercompany banking payments for approval on the banking site
4. Liaise with Cashflow and Treasury manager advising of inter company balances that need moving.
5. Reconciliation of Salary sacrifice schemes
6. Support the FBP in monthly preparation of accounts and delivering to Head of departments
7. Support FBP in monitoring reviews of Scopes of Support ensuring costs are captured correctly
8. To support Finance Business Partner with budget management of departments, in particular with HR and staffing resources, working together with colleagues, to problem solve where there are budget variances. Escalate concerns to AFD
9. Prepare and reconcile monthly cash-flows.
10. Ensure HR database provides accurate financial information to support budget management, identifying discrepancies by monthly reconciliations and preparing salary forecasts.
11. Support SNF process on a weekly basis. Ensuring that all SNF's are cross referenced back to the salary forecast.
12. Assist Finance Business Partner in preparation and maintenance of financial models for budgets, five-year plans and other financial planning information for the academies.
13. To carry out ad hoc projects as required by FBP and AFD
14. To maintain information in a confidential manner, following data protection regulations.
15. To support regular meetings to the heads of departments if required to ensure the smooth running of functions
16. To attend meetings as required to support the finance function with departments
17. To undertake Continuing Professional Development (CPD) and training to update own skills and knowledge
18. To carry out all duties in accordance with OHCAT and College policies, including the Equality and Diversity Policy, Safeguarding policies and Health and Safety Policy

Additional notes

- Job Descriptions are to be reviewed annually
- The responsibilities listed above are the essentials of the post; it is always open to the postholder to propose ways of extending these responsibilities

Person Specification for the Post of Assistant Finance Business Partner

The Person Specification shows the abilities and skills you will need to carry out the duties in the Job Description. Shortlisting is carried out based on how well you meet the requirements of the Person Specification. You should mention any experience you have had which shows how you could meet these requirements when you fill in your Application Form. If you are selected for interview, you may be asked also to undertake practical tests to cover the skills and abilities shown below.

Area	Requirements	Essential/Desirable

Qualifications	AAT-qualified, part-qualified CCAB/CIMA/ACCA, or working towards a recognised accounting qualification.	Essential
	Strong general education, including GCSE (or equivalent) in Maths and English.	Essential
	Evidence of continued professional development and willingness to undertake further training.	Essential
	Degree in finance, accounting, business, or a related discipline.	Desirable
	Knowledge of the education or public/not-for-profit sector financial frameworks.	Desirable
Experience	Experience of working within a finance function, ideally in a management accounting or financial planning setting.	Essential
	Demonstrated experience preparing monthly accounts including accruals, prepayments, and deferred income	Essential
	Experience reconciling control accounts, including intercompany balances and salary-related reconciliations	Essential
	Experience producing or supporting the production of budgets, forecasts, or financial models	Essential
	Experience working with large datasets and maintaining accurate financial records	Essential
	Experience supporting budget holders or non-finance colleagues.	Desirable
	Experience working with HR/Payroll systems and understanding of staffing cost analysis.	Desirable
	Experience of preparing cashflows or treasury-related reporting.	Desirable
	Experience in a multi-entity or MAT (Multi-Academy Trust) environment.	Desirable
Knowledge & Understanding	Understanding of accrual accounting principles and financial control processes.	Essential
	Good working knowledge of budgeting, forecasting, and variance analysis	Essential
	Awareness of financial compliance, audit requirements, and data protection obligations.	Essential
	Understanding of the importance of confidentiality when handling sensitive information.	Essential
	Awareness of ESFA guidance and academy trust financial regulations.	Desirable
	Knowledge of financial issues relating to salary sacrifice schemes and HR-finance integrations.	Desirable
Skills & Abilities	Strong numerical and analytical skills with high attention to detail.	Essential
	Ability to reconcile complex accounts accurately and promptly.	Essential
	Competent in the use of finance systems and advanced Excel.	Essential
	Ability to communicate financial information clearly to non-finance colleagues.	Essential
	Strong organisational skills with the ability to prioritise competing demands and meet deadlines	Essential
	Ability to work both collaboratively within a team and independently	Essential
	Problem-solving skills with an ability to identify discrepancies and propose solutions.	Essential
	Ability to maintain professional relationships and influence internal stakeholders.	Essential
	Ability to support financial modelling and long-term planning.	Desirable
	Experience presenting financial information to budget holders.	Desirable
Personal Attributes	Commitment to OHCAT values, including inclusive education and high standards of service	Essential
	Professionalism, integrity, and discretion when handling sensitive or confidential information	Essential
	Proactive and self-motivated, with a willingness to improve processes and support continuous improvement	Essential

	Adaptable and flexible in response to changing organisational needs	Essential
	Commitment to equality, diversity, safeguarding, and health & safety principles	Essential
	Collaborative approach to working with colleagues across Finance, HR, and operational teams	Essential
	Willingness to attend meetings across OHCAT sites as required.	Desirable
	Commitment to Continuing Professional Development (CPD).	Desirable

Orchard Hill College & Academy Trust is proud to be a Disability Confident Employer, committed to creating an inclusive and supportive workplace for all.

Orchard Hill College & Academy Trust endeavour to make any necessary reasonable adjustments to the job and the working environment to enable access to employment opportunities for disabled job applicants or continued employment for any employee who develops a disabling condition.

*This **Job Description** and **Person Specification** is current but will be reviewed on an annual basis and following consultation with you, may be changed to reflect or anticipate changes in job requirements which are commensurate with the job title and grade in line with the school's changing needs.*

*In line with the statutory guidance in Keeping Children Safe in Education, the Trust reserves the right to request and review references **prior to interview** as part of our safer recruitment process. Any concerns raised will be followed up with the applicant before a recruitment decision is made.*